

EXHIBIT G

EMPLOYEE HANDBOOK



Distributed by:
Human Resources
Office of the Register of Wills
Room 185 City Hall
Philadelphia, PA 19107

<https://secureprod.phila.gov/row/>

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SECTION 1 - INTRODUCTION

1.1 Handbook Purpose:

The Employee Handbook was created to provide employees with written information pertaining to the employment policies and procedures of the Register of Wills.

The information contained in this handbook pertains to all employees. The handbook is a summary of our policies, which are presented as a matter of information.

The Register of Wills Office is committed to serving the public in our capacity as an agency of the City of Philadelphia. We have every confidence that our employees understand that we are dedicated public servants, who provide the highest quality of service to our clients.

We value our staff and we will strive to provide a safe, inclusive and positive working environment that meets the needs of our employees and the public that we serve. We endeavor to make each employee feel valued and respected, in an office free from discrimination and harassment.

1.2 ROW Mission

At the Register of Wills, our desire is to ensure that the residents of Philadelphia have the resources and tools they need to protect and preserve generational wealth. It is both our charge and commitment; a mission by which we will proceed with excellence.

1.3 Organizational Structure

The office is organized into twelve (12) departments:

- Administration
- Archives
- Estate Services
- Inheritance Tax
- Legal
- Mail Services
- Marriage Licenses
- Marriage Records
- Orphans Court
- Outreach
- Probate
- Short Room

Administration

The Administrative Department consists of Human Resources, Finance, Information Technology, and all back office, operations, and ancillary support functions. This team is responsible for ensuring smooth daily operations, internal and external reporting, and compliance with applicable rules and regulations for the organization.

Archives

The function of the Archives Department is to protect, preserve, and provide access to archived estate files, internal financial records, marriage records, and Orphans Court records. After receiving an inquiry, Record Clerks identify, locate, distribute and/or make the file available to staff members, attorneys, and constituents.

Estate Services

The Estate Services Department is responsible for receiving the paperwork required for filing, upon opening an estate. This includes status reports, certifications of notice, and notices of administration and inventory. The department also issues any additional fees associated with inheritance tax and inventory filings, orders archive files from the Archives Department, and researches names and file numbers for the public and title companies.

Inheritance Tax

The Inheritance Tax Department works in partnership with the Pennsylvania Department of Revenue's Inheritance Tax Department. The department assists the public by providing information on which forms are necessary to complete a tax return and acts as an agent for the state in collecting tax payments. The department is fiscally responsible for depositing these payments and reconciling the deposits daily, with the Department of Revenue.

Legal

The Legal Department hears disputes and makes rulings on issues when probate cannot proceed due to an irregularity. Typical issues decided on by the Legal Department include determining the validity of a will in question or, in the absence of a will, determining which heir will administer an estate.

Mail Services

The Mail Services Department processes all incoming mail for the Register of Wills and Orphans Court offices. Much of this mail goes to the probate, inheritance tax and marriage records departments. All incoming checks are recorded in the mailroom prior to being distributed to the appropriate department. Mail Services also processes approximately 100 pieces of outgoing mail per day, typically documents being sent to constituents from the probate and marriage records departments.

Marriage License

The Marriage License Department reviews the necessary documents and collects the appropriate fee for issuance of marriage licenses. In order to receive a marriage license, both applicants must appear together and present the required forms of identification. The department also arranges official marriage ceremonies.

Marriage Records

The Marriage Records Department retains and certifies all records of marriages in Philadelphia County from 1885 to present. For Genealogy purposes, marriage records include parental information from 1915 to present. The department issues two different types of Marriage Records: (Standard) Domestic and (Exemplified) International. Exemplified copies are mainly used for purposes pertaining to dual citizenship. The department also retains all Orphans Court records from 1878 to Present.

Orphans Court

The Orphans Court Department maintains the dockets and files of petitions for incapacitated persons, appointment of guardians, adoptions, and any other matters that may come before the Orphans Court Division of the Court of Common Pleas.

Outreach

The Outreach Department raises awareness around the services provided by the Register of Wills and Orphans Court. This includes coordinating with Philadelphia local, state and federal officials to educate constituents about creating a will and creating generational wealth via the elimination of tangled titles. The department also manages the organization's social media presence and marketing materials.

Probate

The Probate Department administers the estate of someone who has died. This is the process of handling a deceased person's debts and assets, regardless of whether he or she had a will. The team reviews all documents and files related renunciations, oaths of witnesses, and notary verifications. The department is also responsible for generating petitions for probate when there is no attorney of record, to ensure accuracy.

Short Room

The Short Room provides services to customers after the probate process is completed. The "Short Certificate" is a document that is issued and used for the third-party handling of an estate to conduct business on behalf of the decedent (e.g. at a financial institution). The term "Short Room" is an internal ROW designation *only* and is derived from the original length of the document, which was $\frac{1}{2}$ of a page (currently a full page).

SECTION 2 - EMPLOYMENT INFORMATION

2.1 At Will Employment

As an employee of the Philadelphia Register of Wills your employment is at-will. This means your employment is for an indefinite period and it is subject to termination by you or the Philadelphia Register of Wills, with or without cause, with or without notice, at any time.

2.2 Standards of Conduct, Ethics, and Integrity

The Register of Wills is an independent state agency and all ROW employees are required to adhere to the Pennsylvania Public Official and Employee Ethics Act.

For more information, please review the full policy, located in the appendix, or visit <http://www.ethics.pa.gov>.

2.3 Equal Employment Opportunity and Sexual Harassment

The Register of Wills ensures equal employment opportunity to its employees and applicants for employment based on fitness and merit without regard to race, color, religion, national origin, political affiliation, handicap, sex, sexual orientation, perception of sexual orientation or age.

In accordance with the principles of civil and equal rights legislation, each employee and prospective employee will be afforded fair and equitable treatment in all terms and conditions of employment.

Employees are encouraged to immediately report all perceived instances of discrimination to supervisory personnel and to the Deputy of Human Resources. All complaints will be thoroughly investigated in a confidential manner and every attempt will be made to resolve the matter.

The Register of Wills also maintains an environment free of sexual harassment and intimidation. Harassment, intimidation, retaliation or abuse of City employees or applicants for City employment because of race, color, creed, disability, age, national origin, sex, sexual orientation or perception of sexual orientation, as defined in federal, state or local laws, is prohibited. Harassment of the public, by City employees because of the abovementioned reasons, is also prohibited. The City managers and its employees should treat other employees and the public with respect, dignity, and in a manner that is not offensive. The policy prohibiting harassment is to be enforced by all supervisory personnel. Managers and supervisors are required to investigate and take appropriate corrective action when harassment has occurred.

2.4 The Americans with Disabilities Act (ADA) Policy

The Register of Wills Office follows the City of Philadelphia's guidelines pertaining to compliance with Title II of the Americans with Disabilities Act.

The Register of Wills does not discriminate against qualified individuals in our services, policies, or employment practices.

The Register of Wills is committed to providing quality services which are accessible to all individuals. The Office is also committed to making reasonable accommodations for our employees and clients.

If any employee feels that they have been discriminated against, a complaint may be brought to the Deputy of Human Resources. If an employee or potential employee needs to request a reasonable accommodation, those requests may be submitted to the Deputy of Human Resources.

2.5 Diversity and Inclusion

On January 4, 2016, Mayor James F. Kenney, by Executive Order NO. 1-16, implemented a Diversity and Inclusion Policy. The policy promotes inclusive opportunities for the citizens of Philadelphia, in every aspect of City employment, business practices and services.

The Register of Wills is committed to ensuring a diverse and inclusive agency. The organization will always strive to provide opportunities that are inclusive of various races, ethnicities, genders, religious beliefs, sexual orientations, age groups, and economic backgrounds.

The Office ensures:

- Hiring and promotional opportunities which are reflective of the diverse landscape of the City of Philadelphia.
- Hiring and promotional opportunities that allow for a diverse and inclusive selection of employees.
- All employees will be held accountable for treating coworkers and the public with dignity and respect.
- All contract bids will be conducted with transparency, and with a focus on diversity.

2.6 City Residency

As an employee of the City of Philadelphia, you are required to maintain bona fide residency in the City of Philadelphia. Failure to do so may result in immediate dismissal. Residency requirements are authorized by the Philadelphia Home Rule Charter § 3-306 and Civil Service Regulation 30.01. If an employee is granted a residency waiver by the Civil Service Commission or the Administrative Board, the employee must establish bona fide city residency prior to the expiration of such residency waiver.

2.7 Political Activity & Social Media

For more information, please review the full policy, located in the appendix.

2.8 Virtual Work Policy

The primary goal of this policy is to enhance workplace safety and flexibility while ensuring that Register of Wills employees continue to deliver high-quality work products that meet the needs of City residents.

Supervisors may decide how many days per week an employee can work virtually. Once it is determined, the Supervisor should select an arrangement that best fits the work pattern of that department and the work which the employee will be expected to complete.

For more information, please review the full policy, located in the appendix.

2.9 COVID-19 Screening Policy

For more information, please review the full policy, located in the appendix.

2.10 Late Policy

Coming Soon

2.11 Change of Address or Telephone Number

All employees of the Register of Wills are responsible for providing the Human Resources Department with a current home address and telephone number. If an update is required, please contact Human Resources immediately to request a change form. Doing so will ensure that the correct address appears on your employment records, forms, and pay statements. It will also enable the department to contact you in the event of an emergency.

2.12 Employee Identification

All employees of the Register of Wills must wear visible, city-issued identification while working onsite, interacting with the public, or carrying out work-related tasks offsite during the course of business.

2.13 Computer and Internet Usage

Computer equipment is issued, and should be used, for the sole purpose of conducting official Register of Wills and Orphans Court business. Any employee who is found to be using an office computer or laptop for personal matters will face disciplinary action up to and including termination.

Employees are not permitted to save personal materials to computer hard drives. Any employee who has inappropriately saved personal material to their office computer must immediately remove the information.

Computer passwords are confidential and should not be shared amongst employees.

Employees should refrain from eating or drinking near computers, laptops and other types of office technology (scanners, printers, copy machines, etc.). Doing so may result in damage to the equipment.

If you are experiencing technical difficulties with your equipment, please do not attempt to resolve the issue on your own. Email the helpdesk at ithelp@phila.gov or call 215-686-8213.

2.14 One Philly

OnePhilly is the City of Philadelphia's Workforce Management System used to manage Human Resources, Payroll, Benefits, Pensions and Timekeeping transactions in one integrated system. City employees can use OnePhilly to:

- Submit timesheets and track hours
- Complete payroll and benefit transactions
- Update personal information

The links below will direct you to the Employee Self Service Portal in OnePhilly where you can access your self-service account to view job information, update dependents, review your pay stubs and more:

Self-Service at Work: [\[onephilly.phila.gov\]](http://onephilly.phila.gov)

Self-Service at Home: [\[https://ess-onephilly.phila.gov\]](https://ess-onephilly.phila.gov)

If you experience any issues logging in to OnePhilly, you can contact the OnePhilly help desk via phone or email.

OnePhilly Help Desk: 215-988-8038

OnePhillyHelp@phila.gov

2.15 Annual Performance Reports

Coming Soon

SECTION 3 - COMPENSATION AND BENEFITS

3.1 Employee Pay

Employees are paid (biweekly) every other Friday for the two-week period ending the Sunday before payday. A full workday is equivalent to 7.5 hours excluding lunch (35 hours per week, 75 hours biweekly). Federal and State Income Taxes, City Wage Tax, Pension Contributions, Social Security, Medicare Tax, and Unemployment Compensation Tax are automatically deducted from your paycheck. You may also have Union Dues, Fair Share, Deferred Compensation, Credit Union Deposits and Combined Campaign Contributions deducted.

3.2 Longevity Pay

Longevity pay is a salary benefit that rewards continuous service to the City. Longevity increments are presently added to annual salaries according to the following schedule:

After 5 years \$625	After 30 years \$1625
After 10 years \$825	After 35 years \$1825
After 15 years \$1025	After 40 years \$2025
After 20 years \$1225	After 45 years \$2225
After 25 years \$1425	

3.3 Deferred Compensation

The City has adopted a Deferred Compensation Plan (457b) that makes it possible for you to defer income and the payment of federal income taxes on those deferred amounts until a later date. The purpose of the plan is to provide a convenient method of accumulating money to meet your future financial objectives at retirement or when you terminate your employment with the City.

To be eligible for this plan, you must be a permanent employee of the City. The city's current plan administrator is ICMA Retirement Corporation (ICMA-RC). If you are interested in this plan, you should contact the local office for ICMA-RC at (215) 568-1960. ICMA-RC offices are located at 2 Penn Center Plaza, 17th Floor, Philadelphia, PA 19102-1712.

Once you are enrolled, you can manage your account online: www.philly457.com or by phone: 1-800-669- 7400.

New Deferred Compensation Option – Employees separating from city service may now contribute all or a portion (depending on IRS regulations) of their accrued terminal leave pay to their deferred compensation account, on a pre-tax basis. IRS regulations determine the total amount that may be contributed to the 457 plan. This limit includes any contributions already made into the plan. To learn more, you should contact an ICMA-RC Retirement Plan Specialist. In order to take advantage of this new option, you must contact ICMA-RC at least two weeks prior to your separation from city service.

3.4 Health Insurance Information

Employment with the City of Philadelphia provides many excellent fringe benefits.

Non-represented employees are offered a benefits menu package called *Flexible Benefits*. Each employee is given an earned amount of Flex credits as established by the City's Office of Human Resources. You can "spend" these credits on health benefits, life insurance packages, and/or receive a cash payment for any unused credits. Benefits selections that exceed the amount of earned flex credits must be paid via payroll deduction. Available health benefits include a dental plan, prescription plan and vision plan. Life insurance may be purchased for yourself and your dependents in varying amounts. Unused credits can be converted to cash or deposited in a Dependent Care or Health Care Flex Spending Account (FSA). Employees who opt for a cash payment in lieu of any coverage must provide proof of coverage under another health plan.

Note: Insurance agreements and coverages are subject to change. This information is not intended to be an all-inclusive list of benefits provided by the City of Philadelphia. For more information on the Flexible Benefits Program please contact Human Resources.

3.5 Holiday, Vacation, Sick & Other Leave Provisions

Holidays

Currently, full-time City employees receive 11 paid holidays per year:

New Year's Day	January 1st
Martin Luther King Jr.'s Birthday	3rd Monday in January
Presidents' Day	3rd Monday in February
Good Friday	Varies
Memorial Day	Last Monday in May
Independence Day	July 4th
Labor Day	1st Monday in September
Columbus Day	2nd Monday in October
Veterans' Day	November 11th
Thanksgiving Day	4th Thursday in November
Christmas Day	December 25th

Vacation

Vacation credits are earned beginning on your first day of employment and are credited to you on a monthly basis. You may begin to use earned vacation days after six months of fulltime employment. During your first six months as an employee, you cannot take vacation, even though you earn vacation credits starting with your first day of employment. You earn vacation as follows:

- 0 to 5 yrs service: 10 days per year
- 5 to 10 yrs service: 15 days per year
- 10 to 15 yrs service: 20 days per year

After 15 years, you earn vacation at an increasing rate of one day per year until you reach 20 years of service. After 20 years of service, you will earn 25 days per year. Vacation time is issued every calendar year, on January 1st. You cannot carry forward more than 70 days of vacation from one year to the next. Vacation days in excess of this limit will be lost after December 31st of each calendar year.

If you separate from city service for any reason after six months, you will be paid for any accumulated, unused vacation time. If you retire from City service, you may choose to receive payment for all or part of your unused vacation.

Administrative Leave ("AL") Days

Along with your vacation leave, you also earn another type of leave called *Administrative Leave* (also called *Annual Leave*) On July 1st of each year, you will be given four AL days. AL days must be used in whole days only and, like vacation days, must be approved. Unused AL days expire on June 30th of each year. You will not be compensated for any unused AL time upon retirement or separation.

Sick Leave

You begin earning sick leave on your first day of employment with the City, however, you are not permitted to use paid sick leave until you have been a City employee for three months. Employees hired after October 1, 1992 earn fifteen sick days per year. Employees who were hired before that date earn twenty sick days per year. Sick time is earned on a monthly basis; therefore, an employee may only use the time that he or she has accumulated. Employees may carry a maximum of 250 days, from one calendar year to the next, without forfeiting any time.

You earn sick time as follows:

Years of Service	Days Earned (per month)
1-5 years	1 day, 2 hours
6 Years or More	1 day, 5.5 hours

Other Types of Leave

For information pertaining to Maternity/Paternity Leave, Funeral Leave, Military Leave, Unpaid Leave, Jury Duty, Training Leave and other Leaves of Absence, contact Human Resources.

3.6 Pension

All permanent employees must be enrolled in a pension plan. Enrollment in a specific plan is dependent upon your date of hire and employment category. Contact the Board of Pensions & Retirement at (215) 496-7400 for information pertaining to your individual plan.

3.7 Retirement

If you are eligible for retirement and choose to retire, you must submit your intention in writing to the Deputy of Human Resources at least 30 days in advance of your retirement date. When you retire, you must turn in your City ID card, badge (if applicable) and all city-issued equipment in order to receive your final paycheck. After you have retired, you will be fully compensated for any unused vacation time, up to the allowable maximum. You will also be compensated a percentage of any unused sick time, up to the allowable maximum. You will not receive payment for unused Administrative Leave days. Human Resources will arrange your appointment with the Board of Pensions and Retirement.

SECTION 4 - WORKPLACE SAFETY

For your own protection, and that of your fellow employees and the general public, you are required to observe safe work practices as defined by City, Office and Department rules, as well as by the established standards of your occupation. Your supervisor will advise you as to the proper safety procedures for your job. If you are uncertain, please ask for guidance.

4.1 Injuries on Duty (IOD)

If you are injured on the job, report the injury to your supervisor immediately, no matter how slight it may be. Your supervisor will ask you to complete and sign an Incident Report. Your supervisor must then inform the Safety Officer. If the Safety Officer is unavailable, the Supervisor may contact the Deputy of Human Resources. All medical treatment, except for emergency care, must be administered through one of the City's Injury Program Network Provider Sites. Injured employees must provide the Deputy with a *Fit for Duty* report, from the Comp. Clinic's doctor, prior to returning to work. Without the report, an employee may not return to his or her duties.

4.2 Emergency Evacuations and Fire Drills

All employees are required to leave the building during fire drills and emergency situations as soon as the alarms are activated. It is critical that all employees take the alarms seriously and follow the office protocol, in order to ensure the safety of every employee. Employees are encouraged to take their personal belongings.

Supervisors must bring the department's attendance sheet with them when exiting the building. Once evacuated, all employees will meet outside of the M.S.B. At this time, supervisors should determine if the employees in his or her department have all exited the building safely. In a true emergency, if any employee is unaccounted for, the supervisor should inform the appropriate authorities (security guards, fire fighters, and emergency response personnel).

4.3 Workplace Violence

The Register of Wills is committed to providing its employees a workplace free from acts or threats of violence and to effectively respond if workplace violence does occur. For more information, please contact the Safety Officer.

4.4 Workers Compensation

The Claims Unit in the Office of Risk Management handles all claims for personal injury and property damage asserted against the city. A staff of professional claim adjusters investigates the claims; determines if the city is liable under the applicable law; and negotiates and settles claims that are meritorious. Additionally, the claims unit works strategically and collaboratively with safety and loss prevention to mitigate the city's risks and increase public safety, through the implementation of risk management initiatives.

In order to file a claim against the city, you must complete a claim form which can be obtained from your designated Safety Officer or the Deputy of Human Resources. The form must be completed and

- submitted within six (6) months from the date of the incident. If the claim is not received by the deadline, you will be barred from bringing a claim against the city.



Employee Handbook

Acknowledgement Form

I acknowledge that I have received and read a copy of the Register of Wills Employee Handbook.

Name

Date



REGISTER OF WILLS OFFICE

Room 180 - City Hall
Philadelphia, PA 19107
(215) 686-6250
(215) 686-6268 – Fax

TRACEY L. GORDON
Register of Wills

MEMO

To: All Staff
From: Human Resources
Date: October 14, 2022
Subject: Dress Code Policy Effective October 17, 2022

At the Register of Wills, we encourage our employees to dress comfortably in business casual attire. Employees should use their best judgment to dress with professionalism and not wear anything that would make other employees uncomfortable. Clothing should not include profanity or appear distracting or revealing. Our goal is to promote an inclusive environment for all employees.

Under the new dress code, the following items are inappropriate to wear in the workplace:

- *Flip-flops (Safety hazard)*
- *Muscle tees*
- *Backless or strapless tops or dresses*
- *Hats or hoodies (baseball caps or skull caps)*
- *Spandex or tights (unless worn under a knee-length shirt, jacket, or sweater)*
- *Facial piercings*
- *Shorts or skirts with inseams of less than 6" or slits more than 6" above knee*

Anyone wearing these items is in violation of the dress code and will be subject to disciplinary action. Thank you for your cooperation.



Lateness & Attendance Policy

Objective

The purpose of this policy is to set forth the Register of Will's protocol for handling employee absences and tardiness, to promote efficient operations and minimize unscheduled absences.

Policy

Punctual and regular attendance is an essential responsibility of each employee at the Register of Wills. Employees are expected to report to work as scheduled, on time and prepared to start working. Employees are also expected to remain at work for their entire work schedule. Late arrival, early departure or other absences from scheduled hours are disruptive and must be avoided.

Absence

"Absence" is defined as the failure of an employee to report for work when he or she is scheduled to work. An unexcused absence occurs when:

- The employee has not provided his or her supervisor sufficient notice at least 48 hours in advance of the absence.
- The absence request is not approved in advance by the employee's supervisor.
- The employee does not have sufficient accrued time off to cover the absence.

If it is necessary for an employee to be absent or late for work because of an illness or an emergency, the employee must notify his or her supervisor no later than the employee's scheduled starting time on that same day. If the employee is unable to call, he or she must have someone make the call. The employee must follow up by sending an email to his or her supervisor from the work-issued email account.

An unexcused absence counts as one occurrence for the purposes of discipline under this policy.

Employees with three or more consecutive days of excused absences *because of illness or injury* must provide proof of physician's care and a fitness for duty release prior to returning to work.

Employees must take earned leave for every absence unless otherwise allowed by policy (e.g., leave of absence, bereavement, jury duty).

Tardiness and Early Departures

Employees are expected to report to work and return from scheduled breaks on time. If employees cannot report to work as scheduled, they must notify their supervisor no later than their regular starting time. This notification does not excuse the tardiness but simply notifies the supervisor that a schedule change may be necessary.

Employees who must leave work before the end of their scheduled shift must notify a supervisor immediately.

Tardiness and early departures are each one-half an occurrence for the purpose of discipline under this policy.

Disciplinary Action

Excessive absenteeism is defined as up to eight or more occurrences of unexcused absences in a twelve-month period and will result in disciplinary action. One occurrence is equal to one absence, two tardies or two early departures.

- two occurrences - verbal warning
- four occurrences - written warning
- six occurrences - final written warning
- eight occurrences – subject to termination



Requesting Time Off

Please refer to the instructions below and contact the HR Department if you have any questions.

SCHEDULED TIME-OFF

Complete a leave request form:

- Be sure to include the date, type of time, and the amount of time in *one-hour increments*.
- Please review your available leave balances, located at the bottom of your bi-weekly pay statement, prior to requesting time off (a full day consists of 7.5 hours).
- Sick leave can only be updated to *sick certified* when the corresponding documentation is submitted (office visit, return-to-work, doctor's authorization, etc.).
- Administrative Leave time must be used in full-day increments.
- For funeral leave, please use the *funeral leave request form*. You must include a copy of the death announcement when submitting your request or a copy of the funeral program upon returning to work.
 - Funeral leave requests submitted without the required documentation must be processed using time from one of your available leave balances (AL, Vacation).

Submit the completed leave request form to your Supervisor for approval:

- Supervisors must approve the requests via signing the bottom of the form. Once approved, the supervisor or employee should place the completed form in the mailbox outside of Charmaine's office.
- Leave Request forms can also be submitted electronically for approval.

- **Employees** – attach the completed leave request form to an email and send to your direct supervisor.
- **Supervisors** – when approving electronically, please forward the approval email to the employee and copy Charmaine so that the form & approval email can be printed, processed, and filed.

UNSCHEDULED TIME-OFF

- If you cannot report to work, either onsite or remotely, for any reason (callout sick, emergency, etc.) contact your direct supervisor via phone or text, as soon as possible. Follow up with an email to your direct supervisor, from your work-issued email account.
 - Supervisors – forward the email to Charmaine
- Complete and submit a leave request, via the steps outlined above, upon returning to work.
 - If you do not have any leave available, the time must be processed as unpaid.



Leave Request Form

To: HR Department

From: _____

Date: _____

I am requesting:

Annual Leave _____

Sick Leave _____

Vacation Leave _____

Comp: Used: _____ hrs

Earned: _____ hrs

Reason:

For the following dates:

Please submit this request to your Supervisor for approval.

Supervisor Approval: _____ Yes _____ No _____

Date: _____ Remarks: _____



Funeral Leave Request Form

To: HR Department

From: _____

Date: _____

Sadly, my _____, has passed away. I will be taking funeral leave on the following date(s): _____.

*I understand that I must include a copy of the death announcement when submitting this request or a copy of the funeral program upon returning to work. Funeral leave requests submitted without the required documentation will be processed using time from one of my available leave balances (AL, Vacation).

Please submit this request to your Supervisor for approval.

Supervisor Approval: _____ Yes _____ No _____

Date: _____ Remarks: _____

City of Philadelphia's Social Media Policy

Purpose: The City of Philadelphia encourages all departments, offices, employees and public officials to consider how social media can play a role in enhancing communication, collaboration, and information exchange with the residents of Philadelphia. To ensure a consistent and positive approach citywide the following policy regards personal and official use of social media, effective April 1, 2017.

I. Rules for Personal Use of Social Media

The following are rules based on existing policies that all employees must also adhere to when using social media:

- A. City employees must use social media in a manner that complies with federal, state, and local laws and regulations, and with City and agency policies.
- B. City employees cannot publish social media posts containing information that has been classified as confidential and could compromise the safety and security of the City, its residents, or guests. *Refer to the City's existing Information Security Policy - Information Classification.*
- C. City employees cannot use social media accounts in a way that violates political activity rules. *Refer to the Board of Ethics' Regulation No. 8*
- D. City employees have no right to privacy with respect to their personal social media accounts accessed by means of City equipment, or on City time. *Refer to the City's existing Information Security Policy - Acceptable Use.* In addition, public records laws may bring this type of use under scrutiny by the media and public. *Refer to the City's Open Records Policy.*

II. Guidelines for Personal Use of Social Media

While the above are rules and currently existing policies, we also have a number of guidelines that employees may find helpful. While we respect your right to use your social media accounts in ways that are useful to you, these best practices will ensure your personal use of social media does not interfere with your work as an employee of the City. As an employee of City taxpayers, we hope you are proud of your role serving the people of Philadelphia. Because personal use of social media may reflect on the City, or appear to be on behalf of the City, we offer the following guidelines:

- A. On personal social media accounts, the City encourages employees to share the work that they and fellow public servants do to make Philadelphia a better place.
- B. Whether or not your profile says that you work for the City, your audience may think content you share represents City policies. As such, carefully consider the appropriateness of your content before posting it. Furthermore, when posting



personal opinions online, do not imply that your personal views, conclusions, statements, or other social media content are an official communication of the City.

- C. The City considers the activities and uses of social media listed below to be unacceptable. Therefore, it is highly recommended that employees abstain from engaging in any of them on their social media accounts. Do not use social media in a manner that:
 - i. Violates the copyright, fair use, trademark, or other intellectual property rights of any person or entity;
 - ii. Includes threats, profanity, personal attacks or insults, or material that could be considered to be harassing, defamatory, fraudulent, abusive, offensive, or discriminatory;
 - iii. Contains hate speech directed at an individual or group's race, color, sex, sexual orientation, gender identity, national origin, ethnicity, age, religion, medical condition, or disability; and
 - iv. Displays sexually explicit or violent images, cartoons, jokes, messages, or other material.
- D. Exercising common sense when employing social media for professional or personal purposes helps to assure that their great potential is fully realized without inadvertently compromising professional, legal, or ethical standards.
- E. The misconduct described above may result in discipline. However, the City does not, and will not pursue discipline for social media content that constitutes protected speech and/or "concerted activity" for the purpose of collective bargaining, mutual aid, or protection.

III. Personal Accounts of Public City Officials

Many senior members of the administration or public facing employees, like Department Heads, public information officers, or community organizers, are likely to use social media as an important tool to communicate administration policies and news. As such, we've created guidelines to further enhance your use of social media:

- A. The City encourages the use of appropriate social media technologies to strengthen communication, collaboration, and information exchange in support of its mission.
- B. All of the guidelines in Sections I and II apply here, but as an employee whose job requires interfacing with the public, we expect you to hold yourself to higher standards on social media as you do elsewhere.
- C. Those with leadership responsibilities, by virtue of their position, must consider whether personal thoughts they publish, even in clearly personal venues, may be misunderstood as expressing City positions.



- D. In the same way that you engage with constituents and highlight your department's accomplishments at events, we encourage informative social media posting.

IV. Rules for Creating & Managing Official City Accounts

The following rules apply to all official city accounts:

- A. **Official City Accounts:** All new Official City Accounts must be approved by the Department Head and the City's Digital Director.
- B. **Verified Handle or Page:** All Official City Accounts must be verified. The Digital Director will assist with this process once analytics metrics are met.
- C. **Analytics Reporting:** Each department must provide a monthly analytics report for all Official City Accounts to the City's Digital Director.
- D. **Archiving:** It is the responsibility of each department to determine if social media posts need to be archived.
- E. **Security:** It is the responsibility of each department to create a secure password management system.
- F. **Monthly Social Media Meeting:** To encourage collaboration, consistent messaging, and the use of best practices, there is a monthly Digital meeting that a representative from each department employing social media is required to attend.
- G. All Official City Accounts must reflect the mission and values of the City and its departments.
- H. The Digital Director reserves the right to close accounts that do not reflect the mission of the City.

V. Public Interaction with Official City Accounts

To ensure the City of Philadelphia can communicate in an effective and meaningful way with all of its citizens, the following guidelines and rules apply for people who interact on or with Official City Accounts:

- A. Comments may be archived.
- B. The following behavior may result in comments being deleted and frequent offenders being banned from the page:
 - i. Off-topic comments
 - ii. Violation of the copyright, trademark, or other intellectual property rights of any person or entity.
 - iii. Vulgar language, ethnic slurs, material that is harassing, defamatory, fraudulent or discriminatory.



- iv. Displays sexually explicit images, cartoons, jokes, messages, or other offensive material.

VI. Definitions

- A. Social Media: Online sources that allow people to create and exchange user-generated content with others via some form of online or cellular network platform. Information may include, but is not limited to, text, photographs, video, audio, and other multimedia files. Examples include, but are not limited to, Facebook, Twitter, Snapchat, YouTube, Instagram, Periscope and Pinterest.
- B. User-Generated Content: User-created or assembled text, comments, ratings, photos, videos, etc. posted on a Social Media site or with a Social Media tool and shared with others.
- C. Post (noun): Content an individual shares on a social media site.
- D. Post (verb): The act of publishing content on a site.
- E. City Social Media Account or Official City Account: Any official social media channel that is used to communicate with the public by a City department, office, agency, board or commission.
- F. Speech: Expression or communication of thoughts or opinions in spoken words, in writing, by expressive conduct, symbolism, photographs, videotape, or related forms of communication.
- G. General Guidelines: Sections I and II of this Policy which must be followed for Official City social media accounts.
- H. Internal Policy: This Policy applies to all City departments, offices, agencies, boards, and commissions. If you'd like to create a department-specific policy, reach out to the City's Digital Director to create one together.
- I. Mission: The mission of the City of Philadelphia is to deliver efficient, effective services to the people of Philadelphia in every neighborhood.
- J. Official capacity: An individual speaking on behalf of and representing the City. You are acting in an official capacity when your job description or supervisor designates this activity as part of your official duties.
- K. Verified Handle or Page: An Official City Account that has been approved by the Digital Director, Department Head, and received a blue "check" mark from the social media channel to verify its authenticity.
- L. Analytics Reporting: A monthly report of key metrics identified by the Digital Director and submitted for each social media account to the Digital Director.
- M. Archiving: Record retention of social media posts.

CITY COUNCIL OF PHILADELPHIA
EMPLOYEE ACKNOWLEDGEMENT OF RECEIPT OF THE FOLLOWING:

PHILADELPHIA ETHICS CODE
POLITICAL ACTIVITY GUIDE
SOCIAL MEDIA POLICY

I, (print your name) _____,
hereby acknowledge receipt of a copy of the above referenced documents. I further
understand that this statement shall be placed in my personnel file.

Date

Signature of Employee